



**REQUEST FOR PROPOSALS (RFP) No. 00391
FOR
PROGRAM MANAGEMENT AND QUALITY ASSURANCE SERVICES FOR
ADVANCED METERING INFRASTRUCTURE SYSTEM AND INFORMATION TECHNOLOGY INTEGRATION SERVICES**

2.0 SCOPE OF SERVICES

2.1 Background

The County desires to solicit competitive proposals from responsible Proposers to provide program management and other services to oversee implementation of a complete, Turn-Key, AMI System inclusive of equipment, hardware, software, installation and services for WASD, and full system integration services for the listed scope.

The Proposer will work with the WASD Program Manager and executive team to provide program quality assurance and quality control (QA/QC) services, and to manage the scope, schedule, budget, and other issues related to this program. WASD expects the Proposer to assist WASD with negotiating the Implementer contract. When the Implementer is under contract, WASD will expect the Proposer to have oversight responsibility for monitoring all Implementer services. The Implementer's scope of work, defined in a separate RFP, will include:

- a) AMI System Implementation and Meter Installation
- b) Oracle Customer Care and Billing (CC&B) upgrade(s) to most current version
- c) Oracle Mobile Workforce Management (MWM) upgrade(s) to most current version
- d) WASD Website Enhancements
- e) Interactive Voice Response System Enhancements
- f) Oracle CC&B Data Archiving and Partitioning
- g) Financial Services (Billing and Payment) Integration

The Proposer's responsibility shall include implementation of program governance protocols, review of deliverables and review of invoices. WASD will expect the Proposer to have audit oversight responsibility for monitoring all Implementer services. The Proposer will review work products within three (3) business days and forward work products with comments to WASD for review. WASD will be responsible for formal acceptance and comment back to Implementer, if required.

The Proposer will be responsible for monitoring the Implementer's task and schedule progress and reporting status on a monthly basis. The Proposer will be responsible for reviewing the Implementer's monthly invoice and evaluating earned value claimed toward milestone payments. The Proposer will be responsible for providing the necessary expertise, tools, structures, and processes to define, execute and monitor the Organizational Change Management program. The Proposer will perform overall implementation QA/QC activities with respect to all facets of program implementation, training and change management activities.

The tasks considered under this request for proposals are interrelated, and WASD is seeking an experienced Proposer with multiple areas of knowledge and experience with systems implementation, quality assurance and quality control, and change management to work in coordination with the WASD program management team to provide program management, quality assurance, quality control, oversight and guidance for the entire program outlined herein.

Proposers are invited to submit a proposal for oversight of the implementation of an AMI System and information technology integration services necessary to improve the process of collecting water utility meter data, subsequent billing, and customer service in order to enhance the level of service offered to its customers. The proposal should support implementation of program management and quality assurance processes that support the full implementation of the AMI System and Information Technology Integration Services program throughout the entire WASD service area of approximately 465,000 metered accounts. The delivery

period for the services defined in this RFP and the AMI System and Information Technology Integration Services program RFP will overlap, but may not coincide exactly.

The selected Proposer shall NOT:

- a) Be a firm or hire individuals who are selected to perform in any capacity under the AMI System and Information Technology Integration Services RFP.

2.2 Preferred Qualifications

The selected Proposer shall have knowledge and experience with systems implementation and program management, covering the broad subject areas of the AMI and Systems Integration Services program. Additionally, the selected proposer shall work in coordination with the WASD program management team to provide program management, quality assurance, quality control, change management, oversight and guidance for the entire program.

WASD requires a qualified and experienced AMI and CIS Program Management Consultant for the program. The Proposer shall meet the following requirements:

1. Proposer's team should at a minimum consist of the following roles/resources with appropriate knowledge and experience to perform the duties as defined in Section 2.9, Suggested Staffing.
 - Program Manager
 - Quality Assurance and Quality Control Director
 - Change Manager
 - Lead Business Process Analyst
 - Lead Technical Analyst
2. Proposer's Program Manager shall have a minimum ten (10) years or more related experience managing programs/projects similar in size, scope and complexity to this program. Proposer's designated Program Manager should possess a current Program Management Professional (PgMP) certification through the Project Management Institute (or equivalent recognized organization). Alternately, this requirement may be substituted by a current Project Management Professional (PMP) certification through the Project Management Institute (or equivalent recognized organization) and ten (10) years or more of program management working experience.
3. Proposer's designated Quality Assurance and Quality Control Director shall have ten (10) years or more related experience managing quality assurance / quality control aspects of programs/projects similar in size, scope and complexity to this program. Proposer's designated Quality Assurance and Quality Control Director should possess a current certification of one (1) of the following: Certified Quality Engineer, Certified Six Sigma Black Belt, Certified Quality Manager, and/or Certified Software Quality Engineer.
4. Proposer's Change Manager shall have ten (10) years or more related experience managing change management aspects of programs/projects similar in size, scope and complexity to this program.
5. Proposer's team, which may consist of a single prime contractor or a prime and subcontractor(s), shall have successfully completed integrations services, program management and/or quality assurance with volumes over 100,000 end points and services similar to those required by WASD for this program.
6. The Proposer shall have experience as the lead participant as a program manager, installer or systems Implementer in at least one prior AMI System deployment of at least 100,000 end points.
7. Proposer shall have experience as a lead participant with at least one prior CIS systems implementation of 100,000 meters.
8. In a single project or multiple projects, Proposer shall have successfully provided project management services or integration services for Oracle CC&B, Oracle MWM, any Meter Data Management (MDM) system; and interfaced to billing/payment solutions, interfaced to Call Center and IVR solutions, and interfaced to a Website via web services.
9. Proposer must have experience as a lead participant with at least one (1) prior program management deployment of 100,000 meters in the United States.
10. Proposer must have prior experience implementing CIS and/or AMI systems for municipal water and sewer utilities.

2.3 General Responsibilities

- a) Provide program management, quality assurance/quality control, oversight and guidance for the entire program.

- b) Work directly with and advise the Implementer to ensure the success of the program.
- c) Provide appropriate consultant staff based on needed competencies for the program.
- d) Provide project controls and applications for overseeing the program areas listed below, including, any required licenses for WASD and Implementer staff to use the applications. Alternately, Implementer's project controls and applications may be used if preferred by WASD or required by the Implementer:

- 1. Planning and Coordination
- 2. Issues Management and Documentation
- 3. Decisions Documentation
- 4. Communications and Status Reporting
- 5. Task Status Tracking
- 6. Scope Management and Change Management
- 7. Risk Management
- 8. Cost and Budget Management
- 9. Action Item Management

2.4 Program Management Services

The scope of services outlined in this section of the RFP identifies the minimum services to be provided to WASD for the program management services engagement.

The Proposer shall provide oversight and is responsible for fully implementing program management processes and procedures for the entire AMI and Information Technology Integration Services implementation program to ensure the successful transformation from the current manual read based infrastructure to a fully functional AMI solution. Additionally, the Proposer shall ensure that related applications and systems outlined in the RFP are updated to the most current version available during the engagement period and fully integrated with the AMI solution to provide enhanced customer access to information, improved functionality and streamlined operational processes.

The Proposer shall designate a team that will have oversight responsibility for monitoring all services. The Proposer's team will work at the direction of the WASD Program Manager. The Proposer will be responsible for monitoring ongoing integration progress and reporting on status. The Proposer will develop and maintain an Integrated Work Plan and Schedule that includes all the tasks and resources required to successfully complete the program, inclusive of tasks to be completed by WASD, Proposer and Implementer. The Integrated Work Plan should identify anticipated downstream impacts of the AMI program on WASD's operations, and provide recommendations as to how WASD can address or mitigate negative impacts.

The Proposer will work with the WASD Program Manager and PMO to provide quality assurance and quality control services, and to oversee the scope, schedule, and other issues related to the entire program. WASD will expect the Proposer to have audit oversight responsibility for monitoring all Implementer services. The Proposer shall maintain a Program Project Plan and schedule to be followed by the Implementer. The Implementer will deliver all work products directly to the Proposer for review and comment. The Proposer will be responsible for monitoring the Implementer's progress and reporting status to the WASD Program Steering Committee, as detailed in Appendix B, on a monthly basis or as needed. The Proposer will be responsible for reviewing the Implementer's invoices and evaluating earned value claimed toward milestone payments.

The Proposer will be responsible for providing the necessary applications, structures, and processes for management of the program. In addition to general program management services, the Proposer will perform overall implementation quality assurance processes and the associated quality control activities with respect to all facets of program implementation, training and change management activities.

The Implementer is responsible for delivering a fully functional AMI System and Information Technology Integration Services solution that meets the requirements specified by WASD in a separate RFP. A copy of the Implementer RFP and the resulting Implementer contract and scope of work will be provided to the awarded Proposer. The Implementer is responsible for providing the Proposer with all required documentation and records to substantiate services performed in fulfillment of the contracted scope of work. It is expected that a clear and collaborative work environment and process will be established between the Proposer and WASD.

The Proposer shall begin work within twenty (20) days from the date of the Notice to Proceed for the services defined herein. The Proposer will begin prior to the Implementer's Notice to Proceed is issued. WASD expects the related AMI System and Information

Technology Integration Services program to be completed no later than 60 months from the date of the Notice to Proceed to the Implementer that is selected (under a separate RFP).

Proposer shall provide the initial schedule of work within sixty (60) days of receipt of the notice to proceed which is consistent with the scope of the AMI System and Information Technology Services program.

The Proposer shall provide overall and comprehensive program management services which include, but not limited to,:

- a) Act in the best interests of WASD for the course of the program.
- b) Provide program leadership and facilitate decision-making process with WASD and between all program teams.
- c) Provide contract management services for the program.
- d) Engage Program stakeholders and manage expectations to ensure successful completion of the program.
- e) Conduct a comprehensive resource needs assessment to identify required resources and skills for the program implementation effort and beyond.
- f) Define Key Performance Indicators (KPI) to measure Implementer and Program Manager performance as well as measure the success of the program.
- g) In conjunction with the Implementer and WASD, develop, implement and monitor overall program plan and schedule; including AMI System rollout and phase strategy.
- h) Conduct a customer, stakeholder and WASD readiness assessment for phase defined in the AMI System rollout and phase strategy.
- i) Develop and maintain an integrated work plan and schedule that includes all the tasks required to complete the program and upon which clear billing can be processed.
- j) Facilitate the approval process and obtain sign-off from WASD on all program deliverables.
- k) Conduct a technology needs assessment for the program. Provide architectural and technology infrastructure advice and recommendations to WASD for program technology needs and production systems technology needs. Review and comment on technology requirements from Implementer as needed.
- l) Conduct a security needs assessment for the program. Provide security advice and recommendations for systems and hardware and systems within the scope of the AMI System and Information Technology Services program.
- m) Provide oversight for all training activities. WASD seeks to provide adequate focus to employee training and preparation in all areas and systems within the scope of the AMI System and Information Technology Services program.
- n) Review Implementer's invoices and provide guidance to WASD regarding work completion for payment of invoices in accordance with established County rules and regulations.
- o) Program meetings, minutes and status reports.
- p) Conduct program-related meetings. These meetings include weekly program update meetings, weekly or bi-weekly issues meetings, monthly meetings with the program Executive Committee, and presentations to WASD staff.
- q) Publish and maintain all program documentation. This includes minutes at all meetings, maintaining all documentation of decisions, issues, and other program related documentation, deliverables, etc.
- r) Review all documentation and program deliverables in a timely manner and allow the WASD team reasonable time for the review of documents.
- s) Define user acceptance testing process and develop, implement and oversee user acceptance testing plan and activities.
- t) Identify the strengths and weaknesses of Implementer's proposed solutions or approaches and advise County in making business process decisions that reduces overall program risk.
- u) Define approach for Help Desk support for WASD and County staff for AMI related systems.
- v) Amend documents and deliverables based on feedback from WASD.
- w) Assume responsibility for the quality and integrity of all work on Proposer's staff and sub-consultants on the Program Management Team.
- x) Provide project closeout. This process involves work necessary to formally end components of the program and each individual project.
- y) Consolidate and provide final documentation for the projects and program.
- z) Document lessons learned.

2.5 **Quality Assurance Services**

The Proposer shall define and execute quality assurance and quality control processes for the program. Additionally, the Proposer shall publish a Quality Assurance Plan for the program in which quality audits and reviews are conducted at planned intervals. The Proposer shall establish a comprehensive audit process which evaluates all areas of the Program to include:

1. Defects
2. Deliverables
3. Systems
4. Data

WASD expects the Proposer to research and identify audit measures expected by County auditor as well as external audit entities. The Quality Assurance Plan shall, at a minimum, account for the following:

- a) Schedule quality audits with formal reporting as part of the monthly status report process to WASD for the entire program and program teams to ensure that all program requirements are satisfactorily fulfilled. Contents and format of the monthly status report must be defined in the Proposer's submittal (Proposer should leverage the Weekly Status Report Template created by the Enterprise Portfolio Management Office (EPMO)). The status report must include, new issues, proposed resolutions, status of activities, completed tasks, active tasks, performance against the schedule, risks, mitigation strategies, resource requirements and usage.
- b) Project Audits: Identifying gaps and defects along with recommended solutions or mitigation strategies. Audits shall include, but may not be limited to,:
 1. Provide contract management services for the program.
 2. Audit of program expectations: The QA/QC Director shall monitor the change control process and review program scope change requests to minimize scope changes, identify out-of-scope activities and oversee assessment & approval of changes.
 3. Audit of program budget: The QA/QC Director shall monitor program budgets and expenditures by period & program.
 4. Audit of program schedule: The QA/QC Director will assist in the monitoring of program activities and their progress in relation to the program baseline. For each primary activity this will include; the tracking planned completion date and the projected end date; the status of project milestones with the identification of pending, past due, and critical path milestones; and, the status of financial milestones.
 5. Audit of risk: The QA/QC Director will assist in the identification of risk areas which may impact the program timeframe, program budget, system functionality, or other program components as identified.
 6. Audit of contractual issues: Although formal contract documents are developed, signed and agreed to by both parties, many details arise during the implementation which become the source for conflict and disagreement. The QA/QC Director will function as an intermediary to assist in the resolution of conflicts and realistic expectations regarding the delivery and timing of project components.
 7. Audit of Implementer deliverables: The QA/QC Director will review and comment on specific program deliverables as directed by WASD. This may include but is not limited to: the detailed project work program, business process documentation, functional specifications for interfaces and modifications, unit test plans, training plans, conversion plans, system test plan, system test results, bill print format, acceptance test plan, acceptance test results, and other deliverables as identified.
 8. Audits of meter read data from the AMI system versus manually captured reads as each area is converted to AMI and monthly billing.
 9. Ensure synchronization of different hardware and systems for smooth working of the overall AMI system.
 10. Creation and Testing of all Use Cases and User Acceptance Test (UAT) cases.
 11. Responsible for carrying out UAT along with the County's staff on behalf of the County.
- c) Process and procedures to ensure that all of the above components are being met.
- d) Develop and monitor measures to determine success of program.

The Proposer shall be responsible for implementing corrective actions, and solutions to address gaps and defects identified.

2.6 Change Management Services

The Change Management Plan should include a definition of all tasks required of WASD resources as well as tasks to be performed by the Proposer. It is expected that the approach will identify and define required organizational changes along with human resource and workforce transformation plans required to achieve the benefits of the new AMI related systems and applications. The Proposer in conjunction with WASD shall develop a comprehensive Change Management Plan for all subsequent phases of the program that includes, but is not limited to, organizational management, process management and communications management. The Proposer

shall develop a Change Management Plan that will be reviewed and approved by WASD. Upon approval, the Change Management Plan will be implemented under the guidance of the Proposer's Program Manager.

The Proposer will be responsible for reviewing, updating, and maintaining this plan. Responsibility for the Organization Change Management tasks will fall under the jurisdiction of the selected Proposer. The Proposer will provide the necessary expertise, tools, structures, and processes for the Change Management program.

WASD understands that they are ultimately responsible for the successful implementation of change by providing the necessary resources, leadership commitment, and visibility that a change of this magnitude will require. In addition to the Proposer and WASD roles, the Implementer will provide the resources required to participate in developing and reviewing the Change Management program to ensure consistency and coherence with the AMI System solution and software implementation activities.

The Change Management program includes:

- a) Organizational impact and risk management.
- b) Internal communications, including an awareness campaign for WASD staff.
- c) Business process alignment and policy change management.
- d) Organizational Structure assessment and recommendations.
- e) Workforce transformation approach and oversight.
- f) Customer communications.
- g) Ordinance management.
- h) Support public outreach plan, including web portal and messaging.
- i) Prepare informational material and assist WASD with presentation of workshops and updates to County Management and Council, as needed.
- j) Update and assist WASD with regulatory changes and compliance requirements.
- k) Assist with public meetings, as needed.
- l) Lead effort to analyze, improve and update WASD's business processes related to and affected by the AMI System and Information Technology Integration Services scope of work.
- m) Conduct a training needs assessment for all business areas and staff affected by the AMI System and Information Technology Integration Services scope of work.
- n) Develop and deliver training curriculum for business processes, procedures and technical aspects of the new and updated systems within the scope of the program. WASD seeks to provide adequate focus to employee training and preparation in all areas and systems within the scope of the AMI System and Information Technology Services program.

2.7 Selection and Negotiation

As needed, the Proposer shall assist WASD in acquiring professional services and products needed to implement the AMI system and Information Technology Integration services. Such services may include:

- a) Participate in Implementer selection activities that may be pending and any future selections, as needed.
- b) Contract negotiations. Assist WASD with negotiations, as a technical advisor, for Implementer contract(s).
- c) Preparation of scope of work and requests for proposal, as needed.
- d) Proposal evaluation support and recommendations to WASD.
- e) Market research and trends.
- f) Assist WASD with establishing the program governance structure and help finalize project teams with WASD and Implementer.

2.8 Customer Bill Assessment and Redesign

WASD seeks to streamline its current customer bill and leverage best practices along with access to increased information from the AMI System to improve information and value to its customers. The Proposer in conjunction with WASD shall review the current WASD customer bill and provide recommendations for approval by WASD Executive Management. The assessment shall consider current industry and County standards. The assessment should be inclusive of data, layout and production considerations. Detailed documentation of data sources and mapping, bill mockups and an implementation/transition approach shall be provided.

The Customer Bill Assessment and Redesign effort includes:

- a) Cost/Benefit analysis and cost model

- b) Stakeholder analysis
- c) Best Practice analysis
- d) Customer impact and change assessment
- e) Data analysis and mapping
- f) Solution mockup and approval
- g) Solution implementation & transition plan

2.9 **Assessment of Customer Billing and Payment Solutions**

The Proposer shall conduct an assessment of solutions available for customer billing and payments across current channels, including print, email, text, web, mobile, etc. WASD prefers a solution from a full service supplier who is capable of providing all services desired with no subcontracting of any portions of the solution including presorting, programming and electronic presentment of bills.

The Assessment for Customer Billing and Payment Solutions should, at a minimum, consider the following areas:

- a) Options for electronic bill presentment (E-Bill)
- b) Mail options for printed bills / letters, including in-house vs. out-sourcing
- c) Costs associated with the identified options for bills / letters
- d) Bill imaging and online access for printed bills for WASD and its customers
- e) Archiving and online access to bill images up to two (2) years
- f) Lockbox services
- g) Capability to conduct online review of bills prior to printing and mailing
- h) Integration with the County/WASD website
- i) Security protocols and access to sensitive data
- j) Transition plan from current solutions to preferred future solutions, including approach, initial costs, ongoing cost and resource requirements
- k) Payment processing
 - Mail
 - Web
 - Auto-pay
 - Mobile
 - Bank
 - IVR
- l) Real-time notification of payments
- m) Other industry standard options available which may be beneficial to WASD and its customers

The Proposer shall provide a detailed report outlining objectives, benefits, costs, options and associated benefits, resource requirements, technology requirements, implementation plan and risks.

2.10 **Resource & Staff Augmentation**

WASD may encounter the need for additional resources to assist internal staff with technical or functional project activities during the engagement period. In such cases, Proposer may be asked to provide qualified and experienced resources to perform program related tasks on behalf of WASD.

2.11 **Suggested Key Staffing**

WASD requires that the Proposer provide resumes of all proposed staff. WASD reserves the right to interview and approve all proposed staff and work arrangements. As the project progresses, WASD requires that any personnel changes will be approved by WASD in advance to mitigate the risk of negative impact to the project.

Program Manager – WASD requires a full time Program Manager to oversee the entire program. The Program Manager will be required to be on site a minimum of four (4) days per week for the first three-years of the engagement period, and as requested by WASD thereafter. This position will be responsible for the day-to-day management of the entire program and general oversight. The Program Manager will oversee all facets of the program that will include, but is not limited to, installation, design, configuration, data conversion, development, testing plans, testing execution, parallel testing, report development, analytics, training, training materials development, parallel testing, go-live, and post implementation. WASD is especially concerned with read data validation, training to

end users and organizational change readiness. The Program Manager will ensure that these activities are given adequate attention and that the program plan provides adequate time and resources to complete those specific tasks. The Program Manager will review project audits and make adjustments to correct deficiencies as indicated in the audit.

Quality Assurance & Quality Control (QA/QC) Director – The QA/QC Director is responsible for overall quality assurance and quality control of the program. The QA/QC Director will audit the entire program, including all parties and components as indicated in the program structure and organization chart developed for the program. The QA/QC Director will conduct program audits during each reporting period and is required to present a summary of a written report of audit findings and recommendations at the monthly Program Executive Management Committee meetings. The QA/QC Director will be required to be on site as needed and a minimum of four (4) days per month during the periods where Implementer activities are ongoing.

Change Manager – The Change Manager will be required to be on site for a minimum of four (4) days per week during the program planning phase and as needed thereafter for the duration of the engagement period. The Change Manager will be responsible for developing, maintaining and executing the Organization Change Management Plan developed in Phase 1, Initiation and Planning, of the program. Working with the WASD Change Management team, the Change Manager will be responsible for the Change Management tasks identified in the plan and will provide the necessary expertise, tools, structures, and processes for the Change Management program.

Lead Business Process Analyst - The Lead Business Process Analyst will be required to be on site for a minimum of four (4) days per week during the period where process analysis and testing tasks are defined in the program work schedule developed by the Proposer, and as needed during other periods. This position will assist the Program Manager in the day-to-day management of Proposer's scope of work. This person will work with the Program Manager and Lead Technical Analyst to document current state business processes for business units, functions and applications that will interface or integrate with the new AMI System. Additionally, the Lead Business Process Analyst will lead the effort to develop, document and implement process changes to support new processes, procedures and functionality provided by the new AMI solution and systems within the scope of this program.

Lead Technical Analyst -The Lead Technical Analyst will be required to be on site for a minimum of four (4) days per week during the period where technology, infrastructure, application architectural, development and testing tasks are defined in the program work schedule developed by the Proposer, and as needed during other periods. The Technical Analyst will serve as a technical expert on the Program and oversee all technical aspects including solution architecture and design, software installation, system configuration, database design and administration, data conversion, integration, report creation, system testing, performance testing and all other related AMI System solution and CIS technical aspects.

Resumes for the key staff members outlined in this section should be included in the Proposer's response and the proposed resources should attend any presentations by the Proposer for this selection process. Additionally, the Proposer should define the approach for changing resources on the project, if needed.

2.12 Milestones, Key Tasks and Deliverables

Phase	ID	Milestones	Key Tasks	Deliverables
Initiation& Plan				
	1	Launch Program	Conduct Stakeholder Interviews Program Charter Program Kickoff Setup Document Mgmt. System (SharePoint)	Establish Program Steering Committee Program Charter Document
	2	Resources Needs Identified	Conduct program resource needs assessment	Resource Needs Assessment Document Program Chart of Organization
	3a	Approved Initial Program Plan & Schedule	Develop initial work plan	Initial Work Plan
	3b		Develop Work Breakdown Schedule	High Level Work Breakdown Schedule
	4	Program Governance Document Approved	Define Program Governance	Program Governance document
	5	Program Management Office Operational	Establish Program controls and methods. Establish PMO	Program controls and methods documentation Program Team Training (as needed)
	6	Approved Technology Needs Assessment	Conduct technology needs assessment	Technology Needs and Acquisition Plan
	7	Approval of Program Deployment Plan	Define Deployment Schedule Update Program Work Plan and WBS	Field Deployment and Rollout Plan
Design				

	8	Current State Process Documentation Complete Requirements Definition Complete Scope Confirmation	Document Current Business Processes Define High Level Business Requirements Conduct Gap Analysis Requirements Mgmt. Plan	Current State Process Documents Program Requirements Document Requirements Mgmt. Document Fit/Gap Decision Document Scope & Initial Change Control Log Traceability Matrix
	10	Approved Technology Architecture Designed	Technology Architecture Assessment	Technology Architecture Document
	11	Approved Baselined WBS	Finalize program work plan and schedule	Baselined Work Plan and WBS
	12	Approved Organizational Change Strategy	Develop organizational Change Management plan and approach	Organizational Change Mgmt. Plan Human Resources Transformation Plan
	13	Approved Quality Assurance Strategy	Document and implement quality assurance and quality control procedures	Quality Assurance Plan Program UAT Test Plan
	14	Approved Training Strategy	Conduct training needs analysis	Training Needs Assessment Training Approach Document Program Training Schedule(s) Knowledge Transfer Approach
	15	Document Future State Business Processes	Lead effort to define, document and approve future state AML business processes	To-Be Business Process Documents To-Be Business Process Flow Diagrams
	16	Bill Re-Design Assessment Complete	Conduct a full assessment of WASD's current bill and bill printing process. Lead effort to re-design.	Feasibility Study Bill Design Document & Mockup Bill Print Implementation Plan
Configuration, Development, Construction				
	17	Program Audits and Acceptance Test Results	UAT Testing for each project	Acceptance Testing Audit Report
	18	Performance Test Results	Performance Testing	System Testing
Deployment				
	19	Training Complete (per project)	Oversee and support training to users Assess training results	Training Results Report
	20	Define transition approach for AML systems, including, meter rollout, routing, read & bill routing and migration to production		Meter Change-out and Phasing Strategy WASD Transition Plan Read/Bill Routing Alignment High Level Cutover Strategy
Closure				
	21	Post Production Support Complete for each project		
	22	Project Closure and Lessons Learned Session for each project	Document Lessons Learned	Lessons Learned and Recommendations Document

2.13 Progress and Performance

Progress and performance will be measured using the following indicators:

- a) Program schedule
- b) Program budget
- c) Application and Systems Quality Measurements (measured through testing processes and defect tracking)
- d) Issue tracking and resolution
- e) Risk identification and mitigation